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ABSTRACT

These forms implement the management by objectives (MBO) program that is the subject of the cited ERIC documents. The forms can be used to implement a workable MBO system in office, bureau, department, division, agency, institution, school, or community. The forms are intended to provoke critical analysis rather than lengthy replies. As a general rule, discussion is preferable to a long written comment. After an item has been discussed at length, the written reply should be a short statement. Each of the forms is independent and contains directions on how to use it effectively. When all 13 forms have been completed, an operable and workable MBO plan should emerge. (Author/MLF)

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WORKSHOP ON

MANAGEMENT BY OBJECTIVES

FORMS
TO
BE
FILLED
OUT
AT
THE
WORKSHOP

THIS DOCUMENT CONTAINS THE FORMS NECESSARY TO IMPLEMENT
ED 116-045 and ED 125-126

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EA 009 578

INTRODUCTION

These forms can be used to implement a workable management by objectives system in your office, bureau, department, division, agency, institution, school, hospital, learning center, or community.

Each form is self-standing and contains directions on how to use it effectively. These forms are intended to provoke critical analysis rather than lengthy replies. As a general rule, discussion is preferable to a long written comment. After an item has been discussed at length, the written reply should be a short pithy statement.

When all the 13 forms have been filled out like this, an operable and workable MBO plan should emerge.

MANAGEMENT BY OBJECTIVES

IN THIRTEEN STEPS

At this workshop, you will be introduced to management by objectives.

Here are thirteen steps that overview this management process:

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STEP 1

IDENTIFY PROBLEMS, not symptoms

Directions: In the 10 spaces below, list the reasons why you want to implement management by objectives.

YOUR REASONS

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

The following sentences are meant to provoke the reader into:

REFLECTION
REACTION
RATIONAL ANALYSIS
READJUSTMENT OF AIMS
REASSESSMENT OF MBO

A. It's easier to do the job right the first time than explain what went wrong.

B. We want solutions to problems rather than symptoms. However, we won't be happy till the annoying symptoms vanish.

C. Few like to be told exactly HOW to do it.

D. However, we will accept being told exactly WHAT is wanted if we can decide HOW to do it.

E. A million things have to be done.

F. Let's have lunch and talk about it.

G. Something has to be done.

STEP 2

PRIORITIZE REASONS

Directions: In the 12 spaces below, rank the reasons why you want to implement management by objectives.

RANK

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

The following sentences are meant to provide the reader with:

CRITICAL SELF-EVALUATIONS
SPURS TO QUALITY CONTROL OF MBO
PRACTICAL GUIDELINES

A. If your staff hasn't helped rank the reasons, you're only kidding yourself.

B. If most of the reasons haven't been revised in some way, you're only skimming the surface.

C. If management is defined as control, you'll be spending most of your time resisting change.

D. The more forcefully you repress change, the more violent and unexpected the consequences.

E. Bosses often exclaim, "If they would only do what I want, I'd give them what they want."

F. Confused employees often repeat, "If I know what the boss wanted, I'd got it done before the boss had a chance to change goals in midstream."

G. Even in the beehive, the bees have a choice of which flowers to pick. Few bees try to switch from producing honey to steel. The objective is clear.

STEP 3

STRESS VISIBLE RESULTS MORE THAN HOW-TO-DO-IT ACTIVITIES

Directions: In the five spaces below, try to describe visible results that can be achieved in many different ways.

1. _____

_____

_____

2. _____

_____

_____

3. _____

_____

_____

4. _____

_____

_____

5. _____

_____

_____

The following sentences are meant to distinguish ACTIVITIES from RESULTS.

A. To conduct a training session is an activity.

B. To produce managers is a vague result.

C. To produce managers who are competent is a name calling result.

D. To vote on results wanted is a premature and inadequate substitute for discussion of mutual interests.

E. Accountability begins by looking at what will happen if the desired results don't materialize.

STEP 4

BACKTRACK FROM RESULTS TO DOABLE MAJOR TASKS

Directions: In the six spaces below, analyze several major tasks that can add up to one of the desired results.

1. _____
_____
_____

2. _____
_____
_____

3. _____
_____
_____

4. _____
_____
_____

5. _____
_____
_____

6. _____
_____
_____

The following sentences are meant to focus on the process of specifying doable major tasks.

A. For each major task, ask:

HOW MANY people are required?
HOW LONG will it take?
HOW MUCH will it cost?

B. Do the above on scratch paper. Hold off on finalizing the major tasks.

C. Develop several different alternatives.

D. Remember: There always is another acceptable way to get the same or comparable results.

STEP 5

PERSONIFY OBSTACLES TO LOCAL MANAGEMENT BY OBJECTIVES

Directions: In the space below, answer the following questions.

1. WHO is the biggest obstacle?

   Name: _____

   Title: _____

   An example: _____

2. WHAT is the biggest motive for this resistance?

   Apparent motive: _____

   Hidden agenda: _____

   Motive for cooperation: _____

3. WHEN was this obstacle identified?

   _____

4. WHY are you so certain?

   A. _____

   B. _____

   C. _____

5. HOW MANY other explanations are possible?

   A. _____

   B. _____

   C. _____

   D. _____

   E. _____

STEP 6

OBJECTIFY LOCAL OBSTACLES

Directions: In the space below, answer the following questions.

1. What local TRADITIONS work against MBO?

A. _____

B. _____

C. _____

2. What ONGOING PROJECTS could interfere with MBO?

D. _____

E. _____

3. What TIMETABLES and DEADLINES would have to be changed?

F. _____

G. _____

H. _____

4. What REGULATIONS could cause conflict?

I. _____

J. _____

K. _____

5. What INTERPRETATIONS leave room for MBO?

L. _____

M. _____

N. _____

O. _____

6. What PROBLEMS are still remembered from the last time something like MBO was tried?

P. _____

Q. _____

R. _____

7. What can be done WITHOUT ROCKING THE BOAT ?

S. _____

T. _____

U. _____

V. _____

8. WHAT ELSE should be considered?

W. _____

X. _____

Y. _____

Z. _____

STEP 7

ASK "DO WE REALLY NEED MBO?"

Directions: In the space below, answer the following questions.

1. What do most people around here mean when they talk about management by objectives?

   In Theory: _____

   _____

   In Practice: _____

   _____

2. How much MBO actually is going on right now?

   Who: _____

   What: _____

   Since When: _____

   How Openly: _____

   Why: _____

3. What suspicions do some people have about MBO?

   Well Founded: _____

   _____

   _____

   Unfounded: _____

   _____

   _____

STEP 8

RECOGNIZE OBVIOUS ALTERNATE SOLUTIONS THAT HAVE BEEN SOMEHOW OVERLOOKED

Directions: In the space below, answer the following questions.

1. Can you identify successful management practices that were discarded for one reason or another?

   A. How many: _____

   B. How often: _____

2. Why were these changes made?

   A. What was decided: _____

   B. Who decided: _____

   C. Under what circumstances: _____

3. What kind of administrative tracking system is in operation?

   A. Formal: _____

   _____

   B. Informal: _____

   _____

   C. Reconstructable: _____

   _____

STEP 9

ESTABLISH MEANINGFUL SUCCESS CRITERIA

Directions: In the space below, answer the following questions.

1. Are there any fallacious and harmful criteria currently in effect?

   A. Fallacious: _____

   _____

   B. Harmful: _____

   _____

   C. Why: _____

   _____

2. How many situations can you cite wherein activities are monitored much more closely than results?

   A. Which activities: _____

   _____

   _____

   _____

   B. Which results are neglected: _____

   _____

   _____

3. What incentives are given for the achievement of specific objectives?

   A. Which objectives: _____

   _____

   B. Which incentives: _____

   _____

   _____

   C. How does this affect day-by-day operations: _____

   _____

   _____

   _____

STEP 10

DEVELOP AN INCENTIVE PLAN

Directions: In the space below, answer the following questions.

1. Which incentives are out of the question and unusable?

A. _____

B. _____

C. _____

2. Which incentives seem likely to lead to success?

A. _____

B. _____

C. _____

3. Which incentives have produced noticeable success?

A. _____

B. _____

C. _____

STEP 11

SET UP APPROPRIATE PROGRESS REVIEWS

Directions: In the space below, answer the following questions.

1. What measures of progress are used regularly?

   A. Which measures: _____

   _____

   B. At which intervals: _____

   _____

   C. Who decides YES or NO: _____

   _____

2. What kind of follow-up is used?

   A. Which prods: _____

   _____

   B. Which enticements: _____

   _____

   C. Who decides which: _____

   _____

3. How are quality and productivity maintained?

   A. Quality: _____

   _____

   _____

   B. Productivity: _____

   _____

   _____

STEP 12

SYSTEMATIZE THE MANAGEMENT PROCESS

Directions: In the space below, answer the following questions.

1. How does MBO support high priority missions?

   A. _____

   B. _____

   C. _____

2. How is the MBO plan kept realistic?

   A. _____

   B. _____

   C. _____

3. Who gives the proper authority to the MBO plan?

   A. _____

   B. _____

   C. _____

4. Which member of top management is the main MBO backer?

   A. _____

   B. _____

   C. _____

5. What kind of user support does the MBO plan have?

   A. _____

   B. _____

   C. _____

6. How is the scale of the MBO plan geared to the objectives?

   A. _____

   B. _____

   C. _____

STEP 13

COMPLETE THE ONE PAGE PLANNING CHART

Directions: In the space below, specify person hours, staff requirements, and estimated costs for each major activity.

MAJOR TASK	PERSON HOURS	STAFF REQUIREMENTS	ESTIMATED COSTS

CONCLUSION

The manager who lacks a clear program, or a reason for existence, or a set of rational objectives is isolated from reality and insulated from the consequences of administrative decisions. Such a person can hardly be accountable even to oneself.

Using the preceding forms can help a beginner, veteran, or soon-to-retire manager come up with:

A systematic program,
A rational set of priorities, and
A workable implementation plan.

Armed with these administrative tools, a manager can become a leader.